



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Voluntary Report - public distribution

Date: 11/3/2006

GAIN Report Number: GM6036

Germany

Kosher Foods

The Kosher Food and Beverage Market in Germany 2006

Approved by:

Bobby Richey Jr.
U.S. Embassy

Prepared by:

Kerstin Krueger

Report Highlights:

Only a limited number of statistics are available for the German kosher market, mainly because it is an extremely small market. However, compared to the previous reporting period, the number of consumers interested in kosher products as well as stores selling kosher foods has increased. Although the size of the Jewish community in Germany has more than tripled over the past 12 years, very few consume kosher products on a daily basis (about 4 percent). Nevertheless, there is a growing demand for kosher products mainly based on efforts made by Jewish organizations to re-cultivate Jewish life/traditions in Germany. An estimated 60-70 percent of Jewish population consumes kosher products mostly during Jewish holidays or special occasions. Domestic production of kosher products is limited in Germany. Roughly 95 percent of all kosher products in Germany are imported from Israel, France, Holland, Belgium, and the United States.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Berlin [GM1]
[GM]

Summary

Some in the German Jewish community believe that there is little knowledge about kosher within the community due to the fact that 87 percent of the Jewish population in Germany is composed of immigrants from the former Soviet Union, where kosher observance is limited.

Imported kosher foods and beverages, and a limited number of domestic products can be found in local kosher shops, which are mostly located in cities with large Jewish populations, such as Berlin, Munich and Frankfurt. Some of the larger retail supermarkets may sell kosher products, but they only offer a few items such as matzo, wine and gefilte fish. In general, kosher food is consumed mainly within the Jewish community in Germany. The number of other religious groups eating kosher is estimated to be relatively small.

Market Overview

Kosher requirements are not well known among the general German population. As a result, kosher food is still primarily consumed by members of the Jewish community.

In Germany, the total Jewish population is estimated at 202,700, or 0.3 percent of the German population according to REMID, an office supplying statistics on religious groups in Germany, and the Central Board of Jewish Welfare in Germany (*Zentralwohlfahrtstelle der Juden in Deutschland e.V.*). This figure includes about 112,700 Jews, who are registered as members of a Jewish community, and about 90,000 who are not registered. Many Jews in Germany emigrated from the former Soviet Union (about 87 percent by the end of 2005). Of the total registered Jewish population only about 4 percent are strictly kosher (observant) and about 60-70 percent eat kosher during holidays or special occasions. There are approximately 102 Jewish communities throughout Germany with the largest groups based in Berlin, Munich, Frankfurt/Main, and Duesseldorf. These communities are supported by organizations such as the Central Council of Jews in Germany (*Zentralrat der Juden in Deutschland e.V.*), the umbrella organization for the Jewish communities in Germany, and the Central Board of Jewish Welfare in Germany.

Table 1

Estimated size of the Total Jewish Community in Germany 1990 – 2005 (registered)		
Year	Members of German Jewish Communities *	Jewish immigrants from the former Soviet Union
1990	28,100	1,000
1991	27,500	6,200
1992	26,900	10,000
1993	25,800	15,200
...		
2000	18,000	69,900
001	16,500	77,000
2002	14,800	83,700
2003	12,700	89,900
2004	11,200	94,600
2005	15,000	97,700

* excluding immigrants from the former Soviet Union

Source: Zentralwohlfahrtstelle der Juden in Deutschland e.V.

Table 2

Jewish Communities of Selected Cities in Germany – 2005	
City	Population
Berlin	25.000
Munich	9.000
Frankfurt/Main	8.000
Duesseldorf	7.000

Source: Hagalil

Kosher foods can be purchased at a few special kosher shops and restaurants in cities with larger Jewish communities. The shops offer a full range of products. In addition, six large kosher supermarkets in Germany provide on-line services that allow consumers to purchase food and beverage products via the Internet. These retailers are Aviv GmbH, Danel Feinkost, Lehmann & Co. Weinbau, Import-Export, Max koschere Lebensmittel GmbH, Ma'ayan, and HaMason. Some of the larger retail supermarkets, including KaDeWe, Wertheim, and Meyer, offer a very limited selection of kosher products such as wine, matzo and gefilte fish. A small selection of kosher products is also sold in some discount retailers such as Lidl. The larger retailers increase their variety of products only before major Jewish holidays. The consumption of kosher products in Germany is still primarily linked to the Jewish population and driven by the Jewish religious calendar. Interested consumers living in areas outside of the large Jewish communities may have a hard time finding kosher products in their local area, since the market is so small.

Domestic Production

Although domestic production of kosher products is very limited in Germany, there are some companies that produce kosher products under permanent supervision of a local rabbinate. Due to the small Jewish population in Germany, qualified kosher supervisors are hard to find. There are few kosher supervisors in Germany and the distance they must travel increases the cost of kosher certification. This significantly increases the cost of production and it is a major factor for many food producers when considering kosher certification.

About 95 percent of kosher products in Germany are imported primarily from Israel, France, Holland, Belgium, and the United States. Fresh products like bread, Humus, and salads are locally produced, although the ingredients are mainly imported. Kosher meat and poultry are mostly imported from France. In Berlin, there is currently a small amount of local kosher slaughter -- approximately three to four cows per week for Jewish institutions.

In Germany, §4 of the "Law on the Prevention of Cruelty to Animals" prohibits the slaughter of animals without prior anesthesia. This includes the traditional method of kosher slaughter. However, on May 17, 2002, the Federal Constitutional Court decided that certified kosher slaughterers can obtain a special permit for kosher slaughter.

Market Opportunities

Today, Jewish organizations in Germany have put an emphasis on the promotion and re-cultivation of Jewish traditions, including the consumption of kosher products. An example is providing kosher food and prepared meals for senior citizen homes and schools. There are

also many programs and activities specifically targeted at the younger generation to develop awareness about their Jewish heritage, such as educational travel and workshops.

One way to promote kosher food among non-Jewish consumers would be to emphasize the high quality and safety factors associated with producing these products. One could also target people that suffer from lactose intolerance, as their dietary needs could be met by kosher parve products (which contain no dairy or meat ingredient). In general, there is a lack of name recognition in this sector of the food business, which some Jewish organizations would like to see improved in order to gain greater acceptance of kosher products in Germany. Increased demand for kosher food would generate more domestic production and imports, making kosher products more readily available and affordable to a wider range of consumers.

U.S. companies can also consider promoting kosher products to non-Jewish consumers in Germany through participation in trade shows. Suppliers of U.S. national brands that are kosher certified with a kosher symbol on the label will also find a market among the general population as well as the added niche of the kosher market in Germany. The Office of Agricultural Affairs in Berlin recommends the following trade shows:

ANUGA

Cologne, Germany, October 13 – 17, 2007 (Interval: 2 years)

U.S. Pavilion Organizer: B*FOR International, Tel: (540) 373-9935; Fax: (540) 372-1414.

Information on ANUGA can be viewed at <http://www.koelnmesse.de/anuga>

Target Market: Europe/International

Number of visitors in 2005: 158,817

One of the leading international trade shows for food and beverages and the premier show of its kind held in Germany. There is traditionally a large U.S. Pavilion at this show; about 150-200 U.S. companies and associations normally exhibit in the U.S. Pavilion. This is a USDA-endorsed show.

ISM (International Sweets and Biscuit Show)

Cologne, Germany, January 28 - 31, 2007 (Interval: yearly)

U.S. Pavilion Organizer: National Confectioners Association (NCA), Tel: (703) 790-5750; Fax: (703) 790-5752, <http://www.koelnmesse.de/ism>

Target Market: Europe/International

Number of visitors in 2006: 35,250

The world's largest show for snacks and confectionery products. NCA organizes a U.S. Pavilion at ISM, which is also a USDA-endorsed show.

Bio Fach

Nuremberg, Germany, February 15 – 18, 2007 (Interval: yearly)

U.S. Pavilion Organizer: B*FOR International, Tel: (540) 373-9935; Fax: (540) 372-1414.

<http://www.biofach.de>

Target Market: Germany/Europe

Number of visitors in 2006: 37,426

The leading European trade show for organic food and non-food products.

ProWein

Duesseldorf, Germany, March 18 – 20, 2007 (Interval: yearly)

U.S. Pavilion Organizer: Wine Institute's office in the Netherlands, Tel: (31-172) 47 15 71;

Fax: (31-172) 47 55 45, <http://www.prowein.de>

Target Market: Germany/Europe

Number of visitors in 2006: 28,513

The leading German trade show for wine and other alcoholic beverages.

IBA (International Bakers Show)

Duesseldorf, Germany, October 3 – 9, 2006 (Interval: 3 years)

Show Organizer: Tel: (49-2224) 770 40; Fax: (49-2224) 77 04 40

Target Market: Germany/Europe

Number of visitors in 2003: 71,677

International show for bakery and confectionery trade.

Note: For more information about these and other German exhibitions and trade shows, please contact the FAS office in Berlin. Further details can also be found under the following Internet address: www.auma-messen.de

Certification Process

There are several kosher certifying organizations that are widely accepted by the Jewish community. These include the major certification organizations in the United States -- Kof-K, Orthodox Union (OU), Organized Kashruth Laboratories (OK) and Star-K -- which are seen as highly reliable, according to German trade representatives.

Please see the following websites for further information about these organizations:

Kof-K

www.kof-k.org

OU

www.ou.org

OK

www.ok.org

Star-K

www.star-k.org

Domestic kosher production is supervised and certified by the local rabbinate.

Packaging and Labeling

All kosher products must be clearly labeled as kosher, including the kosher certifier's seal and/or the name of the rabbi who certified the product as kosher. Labels must be in the German language, but multi-language labels that include German are also allowed.

German requirements for all food/beverage packaging and labeling, as well as import regulations, also apply to kosher products. Labels must include the following information:

- Name of product as commonly used in trade
- List of ingredients and food additives
- Quantitative ingredient declaration (QUID)
- Alcohol content
- Un-coded minimum shelf-life date
- Storage conditions
- Metric units for all measurements
- Name and address of manufacturer, packer or importer in Germany/EU
- Coded lot identification
- Bar codes

Import taxes/duties

Import requirements, restrictions, and customs duties for kosher products are identical to the requirements for mainstream food products.

Food products that enter Germany are also subject to customs duties that vary by product. The EU has established a harmonized tariff schedule, which applies to all EU member states.

Most processed products are subject to additional import charges (excise and turnover tax which is country-specific). Detailed information on customs duties can be obtained on the website of the European Commission under http://ec.europa.eu/taxation_customs/dds/en/tarhome.htm (Taxation and Customs Union).

Wine with an alcohol content of less than 13 percent (HS-Code 2204 21 11 through 2204 21 80), for example, has a customs tariff of 13,1 EUR per hectoliter and is subject to a 16-percent turnover tax. As of January 1, 2007, the turnover tax in Germany will increase to 19 percent.

A good source of information on customs duties, excise and turnover taxes, as well as import restrictions and other relevant details is the German Customs Information Center website (available in the English language) at www.zoll-d.de.

In general, importers and distributors in Germany are knowledgeable about the relevant import requirements and a good source of information.

Retail Prices

The prices of kosher food products are significantly higher than prices of comparable mainstream items. The variety of kosher products is also quite limited. The following table provides examples of various kosher products.

Sample Products and Retail Prices

(16 percent value added tax included)

Product	Origin	Size	Price (Euro)
Bakery products			
Bagels	Local production	piece	1.00
Bagels	USA	piece	1.00
Charoset	Israel	350 g	1.00
Pita bread, fresh	Local production	10 pieces	3.00
Pita bread, frozen	Israel	6 pieces	1.50
Chocolate Coated Round Matza	Israel	200 g	1.00
Beverages			
Coca Cola	Israel	1 ltr.	3.90
Coffee and Tea			
Coffee, instant	Israel	200 g	7.90
Osem Instant Cocoa	Israel	500 g	2.00
Turkish coffee	Israel	200 g	5.00
Groceries – miscellaneous			
Olive oil, native	Israel	60 ml	3.50
Olive oil, native	Israel	250 ml	7.00
Kusbara Koriander Pesto	Israel	280 g	5.50

Kibbuz Beit Yizhak Dressing	Israel	250 ml	3.50
Haddar BBQ Sauce	USA	510 ml	4.50
Mustard, squeeze bottle	USA	252 g	3.50
Yellow mustard	France	226 g	2.00
Heinz Ketchup	USA	390 ml	2.50
Ungar's Ketchup, squeeze bottle	USA	500 g	2.00
Helman's Mayonnaise	USA	240 g	2.50
Parve cream	USA	280 g	2.00
Herbs and Spices			
Herbs of the Galilee	Israel	20 g	3.00
Saatar	Israel	35 g	3.00
Mediterranean seasoning	Israel	20 g	2.90
Zhug	Israel	20 g	3.50
Segal's Red Pepper Sauce	Israel	500 ml	9.90
Ingredients, Mixes			
Falafel mix	Israel	90 g	2.50
Latkes	Israel	170 g	2.90
Hadar Potato Flour	USA	55 LB	40.00
Meat			
Chicken	Local production	kg	6.90
Chicken breast	Israel	kg	13.00
Chicken	France	kg	6.00
Chicken wings	France	kg	3.00
Chicken cutlet	France	kg	13.50
Turkey breast	Israel	kg	7.00
Snacks and Sweets			
Osem Sesame Crackers	Israel	250 g	2.90
Osem Deli Crackers	Israel	200 g	2.00
Humus	Israel	320 g	2.90
Coated Fingers Man	Israel	250 g	1.50
Kids Waffer, Parve Badatz	Israel	40 pieces	0.10
Jelly Beans	USA	24 x 4 oz	2.50
Soups and Meals			
Mushroom soup	Israel	120 g	2.90
Gefilte fish	Israel	285 g	8.90
Gefilte fish	USA	1.81 kg	20.00
Gefilte fish	USA	6 pieces/ 680 g	5.00
Gefilte fish	Poland	5 pieces/ 680 g	3.50
Hot meals (instant)	Israel	84 g	1.90
Chicken soup, instant	Israel	400 g	4.50
Spreads and Jams			
Schum Schamir	Israel	280 g	5.90
Chocolate spread	Israel	250 g	3.50
Dulce de Leche, Crème Caramel	Israel	340 g	5.50
Orange honey	Israel	350 g	6.50

Fruit jam	France	340 g	3.00
Natural honey	Israel	500 g	5.00
Wine			
Carmel 2000 Dan Grenach Rose	Israel	0.75 l	5.90
Carmel 1999 Cabernet Sauvignon	Israel	0.75 l	6.90
Carmel 1999 Sauvignon Blanc	Israel	0.75 l	5.90
Carmel 1999 Samson Cabernet Sauvignon	Israel	0.75 l	6.90
Carmel Chateau Richon	Israel	0.75 l	7.90
Dalton 2000 Cabernet Sauvignon-Merlot	Israel	0.75 l	10.90
Dalton 2000 Sauvignon blanc fume	Israel	0.75 l	11.90
Manschewitz Concord Kidush	USA	0.75 l	4.50
Baron Herzog Cabernet Sauvignon	USA/California	0.75 l	8.00
Manischewitz Cream Red	USA/California	0.75 l	4.50
Manischewitz Cream White	USA/California	0.75 l	4.50
Manischewitz Blackberry	USA/California	0.75 l	4.50

Source: various German retailers

Weights and measures:

1 gram = 0.03 ounces

1 ounce = 28 grams

1 liter = 0.26 gallons

1 gallon = 3.8 liters

Note: U.S. Dollar/Euro exchange rate:

2003 \$1 = EUR 0.88 or 1 EUR = \$ 1.14

2004 \$1 = EUR 0.81 or 1 EUR = \$ 1.23

2005 \$1 = EUR 0.81 or 1 EUR = \$ 1.23

2006 \$1 = EUR 0.81 or 1 EUR = \$ 1.23

Key Contacts and further Information

List of importers

The following is a list of some kosher product importers:

AVIV GmbH Hanauer Landstr. 50 60314 Frankfurt/Main Ph: (+49-69) 446 017 Fax: (+49-69) 448 064 Avivgmbh.kosherfood@rhein-main.net www.aviv.de Importer/distributor of kosher foods, all types.	Danel Feinkost Pilgersheimerstr. 44 81543 Muenchen Ph: (+49-89) 669 888 Fax: (+49-89) 669 820 DanEl@hagalil.com www.danel.de Retail store for kosher foods and meat products. Interested in kosher products from the U.S. Interested in products from German or British importers
Lehmann & Co. Weinbau, Import - Export Rudolf-Diesel-Strasse 10 64569 Nauheim/GG Ph: (+49-6152) 71 09 99 Fax: (+49-6152) 64 293 mail@weinlehmann.e www.wein-lehmann-co.de Specialized in the import/distribution of rare wines from unusual growing areas.	Max koschere Lebensmittel GmbH Lebensmittelhandel Westendstrasse 71 60325 Frankfurt/Main Ph: (+49-69) 7474 2843 Fax: (+49-69) 7474 2843 info@maxkoscher.de www.maxkoscher.de Kosher food store, online shop, and importer.
R. Dieterich, Spezialitaeten aus Israel Weilerstrasse 16-18 73252 Lenningen/Hochwang Ph: (+49-7026) 7079 Fax: (+49-7026) 81160 Email: www.israel-spezialitaeten.de	Ma'ayan Grindelberg 45 20144 Hamburg Ph: (+49-40) 4210 25896 Fax: (+49-40) 9823 7736 Email: www.hamburg-koscher.de www.israel-weine.de Kosher food store, online shop, and importer.
Kosher-Deli Goethestr. 61 10625 Berlin Ph: (+49-30) 3150 9243 Fax: (+49-30) Kosher-deli@gmx.de	HaMason Weyerstr. 63 50676 Cologne Ph: (+49-221) 278 2255 info@hamason.de www.hamason.de Kosher food store, online shop, importer.
Kol-Bo Auguststr. 77/78 10177 Berlin Ph: (+49-30) 2813 135 Fax: (+49-30) 2813 122	Bakery Taitler Dahlmannstr. 22 10629 Berlin Ph: (+49-30) 3180 8109 www.bakery-taitler.de

Tabularium Krausnickstraße 23 10115 Berlin Mazze, kosher wines and other kosher foods.	Koscher-Laden Hospitalstr. 36 70174 Stuttgart Ph: (+49-711) 2283 603 Fax: (+49-711) 2283 618 Kosher meat
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Jewish Organizations

Zentralrat der Juden in Deutschland

Leo-Baeck-Haus
Tucholskystr. 9
10117 Berlin
Phone (+49-30) 28 44 56-0
Fax (+49-30) 28 44 56 13
www.zentralratdjuden.de

Zentrale Wohlfahrtstelle der Juden in Deutschland

Oranienburger Str. 31
10117 Berlin
Phone: (+49-30) 282 6826
Fax: (+49-30) 282 8529
www.zwst.org

American Jewish Committee

Leipziger Platz 15
10117 Berlin
Phone 22 65 94 0
Fax 22 65 94 14
bergerd@ajc.org

If you have questions or comments regarding this report, or need assistance exporting to Germany, please contact the U.S. Agricultural Affairs Office in Berlin at the following address:

Agricultural Affairs Office
American Embassy
Clayallee 170
14195 Berlin
Ph: (+49-30) 8305 1150
Fax: (+49-30) 8431 1935
Email: AgBerlin@usda.gov
Home Page: <http://www.usembassy.de>

Please view our Home Page for more information on exporting U.S. food and beverage products to Germany, including market and products "briefs" available on specific topics of interest to U.S. exporters. The following reports are available at www.fas.usda.gov, Attaché Reports:

GM5003	Trade Shows in Germany
GM5037	Exporter Guide – Road Map to the German Market
GM5043	Retail Guide – Retail Food Sector Report
GM6030	Food and Agricultural Import Regulations and Standards Country Report